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FinancialPlanning

Wealthtech Weekly

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By Rob Burgess
Reporter

Stuart M. Feld, Raymond James' first-ever chief artificial intelligence officer, told me recently his firm was piloting a new intranet search tech that allows employees to ask natural language questions using generative AI. Experts said this has the potential to provide advisors with additional time with clients, but the results of these queries should be reviewed with a skeptical eye.

Does your firm use this technology internally? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

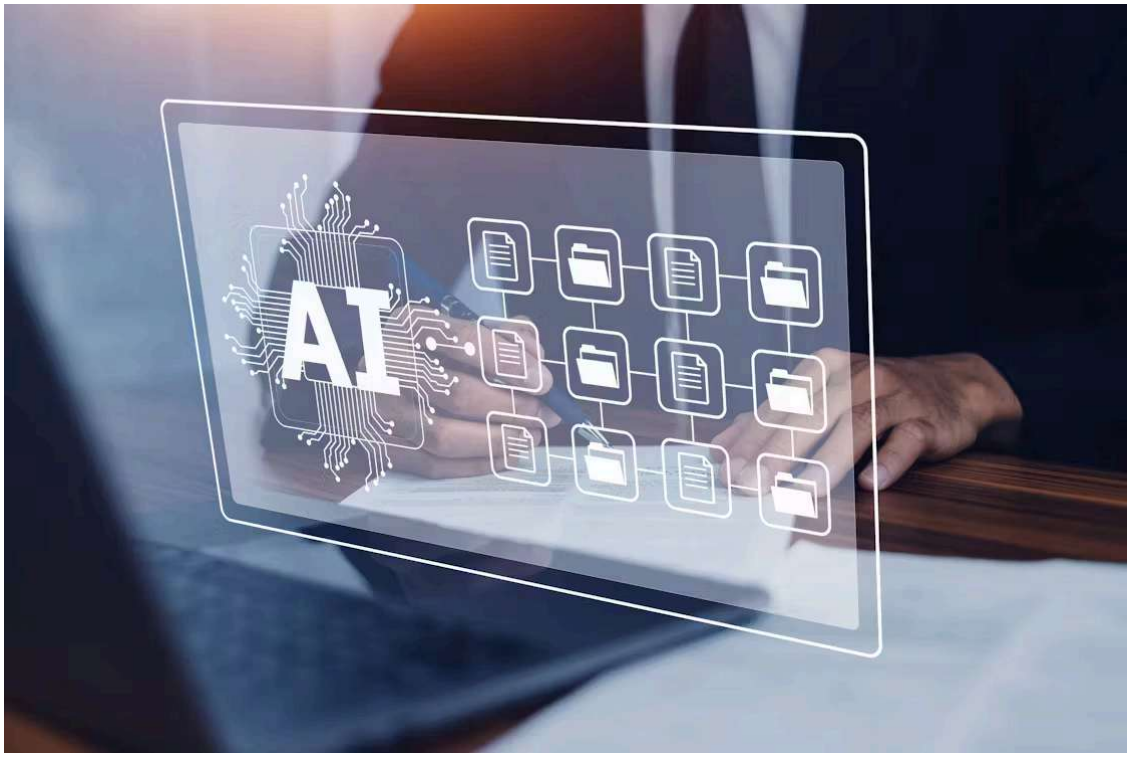
As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

Internal AI tools on the rise, with Raymond James at the forefront



While AI search tools have the potential to provide advisors with additional time to spend with clients, experts say query results should be reviewed with a skeptical eye.

- **How financial advisors can buy a wealth book of business**
  Experts say it's not just about cold, hard numbers. Knowing client expectations can also make or break any potential deal.
- **Ask an Advisor: How do I use LinkedIn to boost my career?**

Of all the social networks, LinkedIn may be the trickiest combination of social and professional. Here's how financial advisors get the most out of it.

- **Pending IRA rules, inflation woes and other retirement planning issues**
  Between the Internal Revenue Service's final rules on minimum distributions and proposed regulations on auto enrolling for Individual Retirement Accounts, here are top retirement landscape changes to be mindful of.
- **How are Trump's tariffs derailing client market confidence?**
  President Donald Trump's back-and-forth tariff plays have some advisors worried they are ill equipped to handle more swings, per new Financial Planning data.

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